

UNITED STATES DISTRICT COURT  
SOUTHERN DISTRICT OF NEW YORK

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KAREN KELLEY, ISRAEL BARAJAS, ERIN :  
ENGLUND, and CHRISTINE LIGHTNER, individually :  
and each as representatives of a class of similarly situated :  
individuals, : 24-CV-05945 (JAV)

## Plaintiffs,

## ORDER

-V-

TEACHERS INSURANCE AND ANNUITY  
ASSOCIATION OF AMERICA, TIAA-CREF  
INDIVIDUAL & INSTITUTIONAL SERVICES, LLC,  
TIAA TRUST, N.A., MORNINGSTAR INVESTMENT  
MANAGEMENT, LLC, MORNINGSTAR  
INVESTMENT SERVICES, LLC, and  
MORNINGSTAR, INC..

### Defendants.

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JEANNETTE A. VARGAS, United States District Judge:

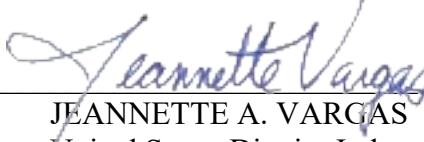
On March 26, 2025, the parties appeared before the Court for an initial pre-trial conference. At the conference, Defendants moved for a stay of discovery pending resolution of the motions to dismiss the Amended Complaint. For the reasons stated at the conference, Defendants' request to stay discovery is GRANTED in part and DENIED in part.

Accordingly, it is HEREBY ORDERED that the parties are permitted to negotiate protocols for the production of Electronically Stored Information (“ESI”) and the form of a protective order. To aid in the negotiation of an ESI protocol, the parties are permitted to exchange draft Rule 34 requests for production, but the responding party shall have no current obligation to object or respond to those requests for production. It is FURTHER ORDERED that the parties shall exchange initial disclosures pursuant to Rule 26(a). The parties are permitted to

serve interrogatories pursuant to Rule 33 and S.D.N.Y. Local Rule 33.3. It is FURTHER ORDERED that all other discovery is hereby stayed. It is FURTHER ORDERED that no third-party subpoenas shall be served at this time, absent leave of the Court.

SO ORDERED.

Dated: March 26, 2025  
New York, New York

  
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JEANNETTE A. VARGAS  
United States District Judge